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ABSTRACT

Walberg and Thomas (1972) have made an attempt to operationalize and validate the concept of open education. However, their conception fails to differentiate between open education and other nontraditional approaches to education, thereby lumping together a variety of different types of classrooms. In addition, their method of item selection does not include less easily observable, but nontheless essential aspects of open education. Because of flaws in their study, caution should be taken before adopting their scales for purposes of further research. (Author)

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CLARIFICATION OF OPEN EDUCATION:

AN ANALYSIS OF THE WALBERG & THOMAS SCALES

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Walberg and Thomas (1) have tackled the arduous task of attempting to operationalize and validate the concept of Open Education. Although they note the difficulty of such an attempt, their research has fallen short of its aim. Its usefulness is curtailed by several shortcomings. This article focuses on the following three aspects of the problem: (a) the operationalization described by Walberg and Thomas fails to differentiate between Open Education and other non-traditional approaches to education; (b) their operationalization does not seem to include the essence of openness; and (c) some of the items on the scales have no logical relationship to the scale labels or themes. Their study represents the pitfalls inherent in attempts to operationalize and conduct research on those less well-defined, less concrete, less observable but nonetheless essential qualities that comprise the components of such non-laboratory educational environments as the Open Classroom. As a consequence, further research based on their scales may create more problems for innovative education than it overcomes.

Differentiation between Open and Other Non-traditional Education

One major source of ambiguity appears to be caused by combining and confounding several educational conceptions, e.g., "'Open Education,' 'the British Infant School,' 'the Developmental Classroom,' 'the Leicestershire Plan,' 'the Integrated Day'" (p.197)

into one and labelling all of these varied innovations as "Open Education." Although there is a great deal of overlap among these various conceptions -- and indeed "British Infant School" and "Leicestershire Plan" have been used synonomously -- the concept of "Open Education" can be differentiated from other innovative concepts such as the integrated day and the informal education of the British Infant model. (See Marshall, 2, for an analysis of some of these distinctions.) Where the goal of research is specifically to operationalize and validate Open Education rather than educational innovations in general, a careful differentiation of Open Education from other non-traditional approaches would provide the prerequisite clarity of conceptualization.

Operationalization: Observability of Openness

Their operationalization of Open Education is also clouded by a method of theme and item selection which ignores the essence of openness. One criterion for selecting and defining themes and scale items is "the attention given the theme in the original writers" (p.199). Because the original writers apparently include those describing the Integrated Day, the British Infant School, etc., as well as Open Education, the scale items seem to include themes common to all these various educational approaches to the neglect of those qualities which are crucial to Open Education but not necessarily important to other non-traditional classrooms. This method seems to obscure rather than clarify the characteristics essential to Open Education.

A second basis for item selection, "meeting the criterion of possible observability" (p.199 , underlining added), further dilutes

the operationalization. This criterion raises the question of how observable the essence of Open Education actually is. It may be that those themes mentioned in the Open Education literature which are the most critical to Open Education are the least observable. The qualities of openness to self, to feelings, to divergent ideas, and to honesty in encounters have been postulated as most basic to Open Classrooms (2,3).

These crucial qualities may be rather difficult to observe; yet a classroom lacking these essential attitudes cannot be considered open. Nevertheless, by utilizing items with a high degree of observability and deleting those which are less observable but nonetheless essential, classrooms which on the surface appear to be open but which in reality lack the less observable essence of openness may be falsely labelled "open". The result of their method of item selection is that 25 of the 50 items of their measuring instrument fall into the scale labelled "Provisioning," i.e., the most observable aspect of an Open Classroom. It is therefore possible for a classroom to receive a high rating on these items and a few from other scales but still not be open because the less observable essence of openness has been disregarded. Their scales may thus be vulnerable to selecting a large number of "false positives." Such classrooms may indeed be non-traditional and innovative, but not necessarily "open."

Operationalization: Relationship of Items to Themes (Scales)

In addition, although some of the names of the themes appear to reflect the essence of openness, the items used to operationalize these themes do not logically describe the themes. For example,

Scale #2 "Humaneness, Respect, Openness, Warmth" is the scale whose label comes closest to describing the essence of Open Classrooms, but the items representing this theme do not logically describe Humareness, Openness, or Warmth. Not one item refers to the openness of individuals towards their own or others' feelings nor openness to divergent ideas nor openness to honesty in encounters. The only item on the total instrument referring to Warmth is located on Scale #8 "Assumptions." Most of the items in the Humaneness Scale refer to Respect. Certainly, respect is important. However, labelling a scale with more constructs than are actually represented by the defining items does not facilitate accurate operationalization.

A similar fault lies in the sole item defining Scale #7 "Self-Perception." "Teacher tries to keep all children within her sight so that she can make sure they are doing what they are supposed to do" has no logical relationship to the scale label. The item refers more to the teacher's role than to the teacher's self-perception. Clearly, scale items which do not logically reflect the construct label are deceptive and undermine the value of the attempted operationalization and validation of Open Education.

Thus, both the method of theme and item selection as well as the lack of logical relationship of some items to the theme labels tend to diminish the usefulness of the Walberg and Thomas scales and the contribution of their study to the operationalization of the concept of Open Education. (Other questions regarding the reliability and validity of the scales, e.g., the number of items per scale -- Scale #7 has only one item -- and whether the scales

would hold up under factor analysis are beyond the scope of this paper.)

Operationalization of Open Education

Where the goal of a study is solely to examine non-traditional teaching models, some further refinement and the inclusion of additional appropriate items would no doubt improve the Walberg and Thomas instrument. However, where the stated goal is to operationalize and validate Open Education, clarification of the characteristics essential to Open Education and the addition of measures specific to the qualities of openness are mandatory. Other techniques, such as interaction analysis, which has been used by Macdonald & Zaret (4) to investigate openness, might be utilized to approximate more closely the essence of openness. Other rating scales, such as those used by Solomon (5) or being developed by Marshall (6), also seem to more accurately reflect many of the essential dimensions of open classrooms.

In addition, further research may reveal that openness in education is neither an additive nor an all-or-none entity but instead might profitably be examined along its essential dimensions through profile analysis (2). Certainly, more refined techniques are required before the research which Walberg and Thomas recommend regarding the effects of Open Classrooms on children's learning can be conducted in a productive manner.

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